Recommended Deployment Plan

The following presents a recommended approach for deploying the curriculum as part of the overall implementation of the PMBP. You may have other approaches. This one reflects some of industry's best for undergoing a major organizational change and responds as well to our own experience with change in the Corps, the findings of the EIG reports on various aspects of the PMBP, and the doctrine contained in ER-5-1-11. Your own plan should be tailored to the specifics of your organization and where it is with respect to change and the PMBP. Leadership's role is critical in setting the direction, guidance and context for deployment planning.

1. **Identify who will do what.** Get the right people for the job! Leadership involvement and support is critical. Everyone in the organization plays a key role in the successful implementation of the curriculum and PMBP as a whole program. Specific roles are described below.

   <u>Project Manager/PDT:</u> The project manager/PDT handles receipt and distribution of the CDs; develops the plan for deploying the curriculum; ensures communication with the workforce; monitors and reports on implementation and interfaces with leadership.

   <u>Facilitators:</u> The primary role of the facilitator is to manage the process of the small group discussion (SGD) and to work with the discussion sponsor to ensure the SGD goals are met. The facilitators should have people skills, a positive attitude about PMBP; be those who want to a facilitator. They don't have to be content experts; although they do need to be very familiar with the subject matter provided in each course. Each facilitator works with a SGD sponsor to plan, design, conduct and evaluate the discussion. The SGD facilitators may also serve as a continuing resource to the organization in other capacities – as facilitation is a critical skill in a team environment. Eventually, it is anticipated that team facilitation will develop into an organizational capability as more and team members develop these skills.

Sponsors: Member of leadership/management; a project manager; or other position of influence that works with the facilitator to ensure success of the SGD. The sponsor attends the SGD, gives a kick-off, is a full participant, and helps the facilitator to keep the group moving forward to achieving goals as needed. The sponsor also serves as a resource for identified follow-up after the SGD. The sponsor should be a person with a positive attitude about PMBP, who is in a position (not necessarily formal) to help with follow-up on any issues identified at the SGD, and a person that the SGD participants feels safe with for creating an environment of sharing. Sponsors and facilitators are identified as part of the PMP development for curriculum deployment.

Participants: Participants are active team members in the discussions of the SGD. They can be a functional group; an established PDT; or a cross-functional group established for the purpose of the SGD. Expectations for them are that they attend the SGD, fully participate, keep an open mind, contribute to the success of the SGD, and come prepared by having done the self-study.

Mentors: Mentors are identified members of the organization that are the "go to" people to clarify understanding of the PMBP; reinforce the PMBP principles by their own behavior; remove obstacles; and give advice and support. Many identify this as a role for senior leadership in the organization. Their key role is reinforcement of the key learning points of the PMBP. They may be thought of as "Organizational Mentors" for the PMBP – rather than the more traditional individual-based relationship view of mentoring. Mentors may attend SGDs. Mentors may also serve other roles, e.g., as sponsors. A key consideration on mentor attendance at any particular SGD is the participants' level of comfort and the SGD goal for full participation and sharing of perspectives and ideas.

Coaches: Coaches are those in your organization that may directly work with teams and coworkers to help integrate the PMBP principles. They may include any of the above or others. A coach may be a coworker or team member. They become the informal network of those who emerge as part of their personality and understanding of

PMBP to assist coworkers and teams. These are people with high organizational trust that others go to naturally for assistance.

2. **View the PMBP curriculum as a project.** Establish a project manager, assemble a project delivery team, and prepare a Project Management Plan for deployment. Put the right people in the right job! In addition to the project manager, some suggested roles: facilitator group representative; PMBP mentor; IT; logistics (for setting up the SGD); management/leadership cross-section; emerging leader; one or two members of the workforce; and a financial person (funding accountability and tracking).

   *(**NOTE**: There are a lot of ways to look at the deployment of the PMBP. Some divisions are taking a regional view and are managing the PMBP and all its components as a program with regional oversight provided by the division for some consistency of approach and metrics from district to district. Most districts have assigned a project manager to manage the implementation of PMBP as a project in their district. Teams are being assembled and members assigned to take the lead on various aspects of the PMBP as they become available – e.g., the curriculum, the business process manual (including the development of local procedures), and P2.)*

3. **Develop a Project Management Plan.** The team develops a curriculum deployment PMP (could be a component of a PMBP Implementation PMP). Team works with senior leadership to develop the specifics of the deployment plan, including how it will be communicated and tracked; who will take what by when; how the small group discussions will be managed; expectations associated with the curriculum; how it will be funded, etc. Suggested key elements in the plan (not necessarily in exact order):

   - **Kick-off event – town hall, communication campaign.** Use more than one medium. Provide a place for people to ask questions and get responses regarding the PMBP and the curriculum. Develop a deployment communication plan.

   - **Senior leaders involvement.** Parallel with the above and as a critical first step of the deployment plan, the senior leaders in the

organization view the Introduction and Course 1 – Why PMBP? They hold a facilitated small group discussion following the Chief's/MSC example. Provide the results of the discussion via a rollout town hall or via video made available to the workforce. *(Note: Video of the Chief's SGD is available)*

- **Senior leaders engage the rest of management** through facilitated small group discussions with the district/center etc. management team.

    (Note: One possible way to do this is to assemble all managers in the district/etc. for a one-day event. Provide an overview of the curriculum and set the expectations for implementation, integration of learning principles, and follow-through. Everyone attending as a requirement would have gone through the self-study for the Introduction and Course 1 – Why PMBP? Then break large group into smaller groups, assign a senior leader to each small group to serve as both mentor and workshop sponsor and a facilitator to conduct small group discussions. Share key learnings/"Aha's" with the larger group. Discuss what next – review issues place in the Parking Lot (or BIN) and identify areas where additional clarification may be necessary. Develop a plan for follow-up.)

- **Perform an assessment**. Using the results of the above as well as other inputs that may be available, conduct an assessment of where the district is in terms of the PMBP. This will guide the focus for the discussions in the SGD, for follow-up actions, and for the criteria developed to measure as metrics for determining the results of PMBP implementation.

- **In-house facilitators**. Parallel to above planning, train in-house facilitators to help with conducting small group discussions.

    (Note: As part of the curriculum project, instructors for this training are available throughout the Corps and have been teaching small group discussion facilitation through regional workshops coordinated with POCs at each division. Many districts have trained a handful of facilitators at

these regional workshops and then have had those train others in their local districts. Suggest that the facilitators do a "pilot" SGD practicing what they learned about conducting a SGD together before the "real" SGDs are initiated. Use an experienced facilitator paired with an inexperienced to do the leadership SGD – and other SGDs as needed to gain confidence in doing the sessions.)

- **Develop a plan for how the disks will be viewed.** Each person on their own? Together in groups? How much time? Specific times allotted? Or given a target completion date, you are on your own?

  *(**Note**: One approach for those who may have trouble finding time, do not have easy access to a computer or have trouble getting the disks to play, is to have scheduled group sessions where a facilitator(s), an IM POC, and a PMBP mentor/sponsor meet in a computer training room and work through the curriculum viewing with a group. All the workforce is invited; variety of times are offered; sign up ahead of time to ensure numbers can be accommodated.)*

- **Develop a small group discussion plan.** Plan will include participants, which course/module, where the SGD will be, and when as well who will facilitate and who will sponsor each discussion. Will the discussions be done in teams? In functional groups? In combination? Will supervisors be present? How much time will you allot? What questions will you focus on for your discussion? Who will sponsor each SGD? Will PMBP mentors be present?

  *(**Note**: Recommend a cross-functional group for SGD as it maximizes opportunity for learning and sharing understanding and reinforces the PMBP team environment.) An alternative approach may be to engage first line supervisors with their functional groups for a start, to introduce this method of learning, begin to engage the workforce, and set expectations. The supervisor in this case could be the workforce sponsor, working with the facilitator to design the SGD and to develop what questions should be asked. (Remember that questions and possible discussion*

points are provided for each course). Then with subsequent courses, cross-functional groups could be assembled (one district identified small groups by using the list of names provided in Outlook). A mix could be done (some discussions be functional group oriented - depending on the subject matter; others be cross-functional groups either keeping the same together or mixing them with each course. A couple of make-up sessions could be scheduled for those who are not able to attend their designated SGD time.)

- **Establish course completion recognition/incentives.** Be creative – be sure not to skip this step! Recognition is important for both self-study and the SGD portions.

  (Note: Course certificates are available at the end of each course self-study from the virtual campus if the evaluation is completed. Talk to other districts if you are looking for ideas. Some have been very successful with incentive awards.)

- **Include provision for providing feedback** on the curriculum itself as well as for identifying gaps and further actions in PMBP deployment in the organization.

  (Note: Parking Lots (BINs) from each SGD list issues that may need follow-up action. At the end of the session be sure to review the BIN items and "pin the rose" on further action if necessary. For example, if there is confusion on a PMBP principle and its application, that issue could be referred to senior leadership/mentor(s) for clarification and publishing of the clarification for the benefit of the whole organization. Key issues of broader applicability could be posted in the lessons learned discussion forum of the PMBP Portal for sharing with the whole Corps – perhaps stimulating discussion and further clarification with others. Additionally, the key results of each SGD AAR could be shared. This begins to spread lessons learned for continuous improvement - a foundational principle of a learning organization - and enhances achievement of common understanding of the PMBP throughout the Corps.)

- **Metrics.** Include metrics for measuring the results of the curriculum deployment. How will curriculum success be defined? How measured? Recommend a qualitative versus solely a quantitative (numbers taking courses) approach.

  *(**Note:** One approach is to develop criteria for success, then conduct interviews of a few teams (both management and project delivery teams), followed by a facilitated discussion to consolidate results and ratings with senior leadership members on how we are doing. Indicate red, amber, and green as indicators; report to all members of the organization. Perform the evaluation on a regular basis. See "An Approach for Measuring Success" in this kit.)*

- **Develop** *a* mechanism for integrating curriculum learnings and identified gaps into other organizational systems - e.g. training plans/IDPs; workforce planning strategies, such as capable workforce/METL; development of operating budgets, strategic planning, awards, performance evaluations, etc.

  *(**Note:** Engage employees/management in the systems changes. Organize subgroups that take strategic ideas under the general guidance provided by the leadership and develop plans for action implementation.)*

4. **Implement the plan!!!** Notes on implementation are provided in the above component descriptions. More tips are provided in the Self-Study, Small Group Discussion and Reinforcing the Curriculum Guides in this kit.

5. **Provide feedback on what you have learned, best practices and good ideas for Corps-wide sharing.**
   *(**Note:** the PMBP Portal provides an opportunity for anyone to post and share learnings with others in the Corps.)*

6. **Capture lessons learned** for continuous curriculum improvement – e.g. through facilitators, course evaluations and posting to the PMBP Portal.

*(**Note**: The curriculum team will review postings as well as the course evaluations and facilitator input for continuous program and course improvement.)*

7. **Additional support and Information:**
    - Members of the curriculum team will be available to provide deployment support/advice/ assistance as requested to the field.
    - PMBP Portal
        - ✓ Information about the curriculum
        - ✓ Lessons Learned Discussion Forum: sharing of information; best practices for deployment; ideas and lessons learned related to the PMBP.
        - ✓ On-line mentoring training (via PMBP curriculum website)